



# STATE OF MONTANA DEPARTMENT OF REVENUE JOB PROFILE

**Working Title**

Liquor Division Management Officer

**Job Code Title**

Administrative Services Manager I

**Pay Band**

6a

**Job Code Number**

13116

**Liquor Control Division**

Administrative Team

**Fair Labor Standards Act**

Non-Exempt

The Montana Department of Revenue administers more than 30 state taxes and fees; establishes values for taxable property, including agricultural land, residential real estate, commercial real estate, forest land, business equipment, railroads and public utilities; supervises the operation of the state liquor stores and agencies and administers the laws governing the sale, taxation, and licensing of alcoholic beverages; and returns unclaimed property to its rightful owners.

The Liquor Control Division administers the state's Alcoholic Beverage Code, which governs the control, sale, and distribution of alcoholic beverages. The division provides customer service with a focus on public safety to ensure a safe, orderly, and regulated system for the convenient distribution and responsible consumption of alcoholic beverages. The Liquor Control Division includes the Administrative Team, Liquor Distribution Unit, and Liquor Licensing Bureau. The Administrative Team oversees the daily management of the division. This group of staff consists of the administrator, management officer, and division support staff.

**Job Responsibilities**

The Liquor Division Management Officer serves as a member of the division's management team and assists the division administrator in managing the day-to-day division functions and operations including staffing, budget tracking, internal and external communications, project coordination, planning, and setting goals and objectives. The incumbent also performs a number of specialized licensing services such as coordinating special permits requested by non-profit organizations, sporting, fraternal organizations, and others for sale of beer and wine at special events. The position reports to the division administrator and supervises assigned staff.

**• Division Operations 50%**

1. Develops and establishes policies and procedures for office management and administrative support functions to maintain consistency among various programs; ensure compliance with state and department requirements; and promote quality, efficiency, and cost-effective operations and services. Monitors conformance with policies and procedures to identify and resolve problems. Establishes and monitors methods, procedures, and priorities for various administrative support projects and processes.
2. Prepares, maintains, and processes reports, correspondence, documentation, administrative actions, files, and records in accordance with applicable guidelines and time frames. Analyzes, and applies statutory requirements related to receiving, maintaining, and disposing of sensitive information. Monitors the flow of information to ensure compliance. Develops and maintains electronic and manual records systems. Oversees records retention and disposal procedures.
3. Develops plans for communication, customer service, data and records management, inventory control, contract monitoring, procurement, and other functions.

4. Analyzes and evaluates performance indicators (budgets, surveys, error logs) to ensure the overall effectiveness of office management and administrative support services. Coordinates with program managers and staff, cooperators, and others to identify and resolve deficiencies; evaluate changing operational and service needs; and develop new approaches to operational and service delivery issues (budget adjustments, revised procedures, expanded services).
5. Coordinates and monitors contracts for equipment, materials, and services to ensure conformance with bids, specifications, warranties, and related terms and conditions. Assists in the development of Invitations for Bids and Requests for Proposals and related selection criteria. Coordinates review and selection. Monitors contract delivery. Tracks contract performance, expenditures, and outcomes to identify and resolve deficiencies.
6. Ensures courteous and efficient responses to inquiries and requests for assistance from office staff, agency representatives, members of the public, and other visitors. Researches and compiles general and specialized program information. Ensures consistent messaging on policies, procedures, and statutes.
7. Writes, transcribes, and edits statistical and narrative reports, spreadsheets, and other technical documents to provide accurate, complete, and accessible references (administrative rules, legislative materials). This typically involves the application of specialized word processing and spreadsheet functions (tables, columns, graphs, formulas), formats, and production specifications. Coordinates document reviews, revisions, and signatures; reproduction; and dissemination as requested.
8. Maintains office equipment and supplies by monitoring supplies; ordering supplies as needed; and by calling appropriate repair and backup staff depending on the equipment and service contract.
9. Monitors and evaluates division workflow, logistics, and schedules. Tracks division performance standards and progress toward goals, identifies actual or potential conflicts or barriers, and works with the division's management team to resolve problems. Develops and recommends new procedures and processes to promote consistency, efficiency, and cost effectiveness.
10. Tracks operational budgets to inform the administrator and managers of the division's overall budget status, projections, deviations, and processes. Researches and analyzes allocations, expenditures, and justifications to provide specialized reports and recommendations as requested.
11. Evaluates comments, complaints, and requests from public officials, private interests, and members of the public on issues associated with liquor control operations. Determines the relative significance of and appropriate responses to written and verbal communication. Refers issues to the appropriate staff for response. May draft responses for signature.
12. Coordinates internal communications between the administrator and other department managers to ensure effective flow of information. Establishes and coordinates communication tools, materials, and schedules for managers. Develops and distributes summaries of management decisions, initiatives, and directives. Informs the administrator and managers of discussions and decisions from meetings that they could not attend.

- **Licensing Operations 25%**

1. Evaluates licensing documentation and applicants to approve or deny applications from breweries, wineries, distilleries, and vendors outside of the Montana. Reviews the information provided, determines if additional information is needed, and requests it. Handles renewals as well as applications for new or revised licenses. Issues decisions.
2. Processes updates and changes in liquor licensing transactions such as new licenses; adding a mortgage to an existing license; or refunding excess payments to ensure the funds balance and funds are entered into the proper account.
3. Reviews and approves beer and wine labels to ensure the amount of alcohol is legal under Montana law. Sets up miscellaneous liquor cases in the state's revenue tracking system. Oversees regular on-premise license renewals. Consults with the administrator to identify specific needs and objectives. Coordinates internal and external processes.

- **Staff Leadership, Management, and Supervision 20%**

The incumbent is responsible for leading staff and managing day-to-day activities of the office. Responsibilities include monitoring the progress of work plans, goals, and objectives and aligning them with the department's goals and priorities. Supervision and development of staff is imperative to a manager's success.

Staff Leadership

1. Creates and maintains a high performance environment characterized by enthusiastic and positive leadership, direction, and a strong team orientation. Motivates employees to accomplish numerous division goals and objectives. Coordinates performance measures with staff. Encourages the development of new techniques or solutions to problems and assists with the resolution.
2. Readily adapts to changes in existing operations, programs, services, activities, and functions. Makes recommendations. Takes necessary action to implement or accommodate changes. Maintains a positive attitude in communication to staff even when difficult changes arise.
3. Maintains an atmosphere of safety within the office. Ensures adequate training for all staff in proper lifting techniques, sensible ergonomic practices, and work-specific safety opportunities.
4. Makes and accepts responsibility for decisions necessary to carry out the office's mission.
5. Accepts direction and feedback from supervisors and follows through appropriately.

Management

1. Conducts strategic planning in coordination with the division administrator to develop and establish short and long-range plans. Participates in development of viable goals and objectives consistent with agency priorities.
2. Develops programs, policies, and procedures to assure the citizens of Montana that the department operates in accordance with the highest standard of integrity and ethics.
3. Evaluates state and national standards; new trends and technologies; office needs; and other factors to integrate requirements and resources into program plans.
4. Establishes priorities, deadlines, and work plans for program activities. Evaluates workflow processes, efficiencies, and problems to identify the most effective use of staff and material resources to meet goals and objectives. Appropriately allocates resources to accomplish assigned work by coordinating with other work units and programs and adjusting subordinate assignments as needed. Considers pertinent factors such as available resources, staff ability, timelines, and work load. Identifies the need for additional staff or resources while maintaining fiscal responsibility.
5. Plans, schedules, and assigns special projects. Initiates adjustments to reflect changes in overall division and agency goals, operations, and relationships to departmental divisions.
6. Reviews and monitors progress through meetings and consultations. Conducts staff meetings, disseminates data, and promotes information exchange for support and advancement of department mission and goals. Uses input from the staff to guide program responsibilities.
7. Recommends program budgets for staff and equipment. Reviews allocations, project plans and objectives, and expenditures.
8. Identifies information needs and develops reports, information systems, spreadsheets, and other tracking methods to monitor program status, work progress, unit performance, and individual performance. Uses data to identify areas of concern, strengths, and weaknesses. Provides analysis and recommends solutions to department management to resolve problems. Oversees quality control of information and sources.
9. Prepares correspondence in response to requests or inquiries. Ensures that necessary reports, correspondence, documentation, administrative actions, files, and records are correctly prepared, completed, maintained, and processed in accordance with applicable guidelines and time frames. Ensures the office follows department expectations regarding disclosure and employee confidentiality.

### Supervision

1. Recruits and hires employees. Interviews applicants and makes appropriate selection recommendations according to applicable laws, rules, policies, procedures, and guidelines. Ensures proper training and orientation of new employees.
2. Establishes criteria for acceptable work behavior and performance. Promotes workplace efficiency and productivity by educating, mentoring, coaching, and correcting employee behavior. Encourages exceptional performance and improvement in areas of individual weakness. Develops and monitors corrective actions.
3. Appropriately reviews, recommends, and initiates personnel actions according to applicable policies, procedures, and guidelines. Carefully considers options available. Works with Human Resources to take appropriate disciplinary action as needed. Enforces disciplinary policies.
4. Recognizes and promptly resolves internal and external issues. Mediates personnel issues in a very timely manner.
5. Completes employee performance reviews. Defines goals and required results at the beginning of the performance review period. Communicates on a very regular basis with staff on progress toward those goals and results.
6. Determines the training needs of staff through analysis of program effectiveness, new technology and policies, and staff performance. Ensures consistency in the application of training opportunities for all staff. Develops and enhances on-the-job training opportunities to ensure staff is provided the needed training to fulfill their job duties including cross-training opportunities. Provides necessary information and tools to staff to complete any new tasks and duties.
7. Communicates policy and procedures clearly and effectively in order to obtain desired results. Ensures staff adhere to rules, policies, procedures.
8. Monitors and approves staff leave usage while ensuring adequate coverage is maintained.
9. Upholds and promotes the department's conviction to customer service throughout agency contacts as well as in communication with taxpayers. Staff is held accountable for providing the highest level of customer service to all those that they come into contact with.

### • **Other Duties as Assigned 5%**

1. Performs other duties as assigned by the division administrator.
2. Acts for the division administrator as assigned.

### Job Requirements

To perform successfully as a management officer, the incumbent must be self-motivated; possess a strong work ethic; maintain a positive attitude; and enjoy working with, and for, the public. Strong communication skills and the ability to communicate effectively and respectfully are required. The incumbent is required to analyze complex issues; identify others' underlying concerns and motives; deal with controversy and hostility in a professional and objective manner; establish effective relationships with others; and work effectively under pressure. Seasoned judgment in decision making is necessary since the work is performed with minimal guidance and within broad guidelines. It is essential that the incumbent has the ability to work independently but also as part of a team; maintain a high performance team, and make sound decisions and be accountable for them. The incumbent is expected to apply critical thinking skills; be a problem solver with the ability to identify and resolve tactical and strategic issues before they become problematic; resolve operational issues; elevate matters as necessary; recommend solutions; and effectively implement division changes and management directives. Incumbent is required to exercise discretion and judgment in handling confidential and sensitive information.

This position requires knowledge of liquor licensing processes, regulations, and requirements; general management practices including strategic planning; principles and methods of work planning; performance management including setting goals, objectives, and measures; operational and program planning; quality assurance methods; organizational development; project management; and

governmental organizational structure, accounting, and budgeting. The work also requires knowledge of computers and database management including state and department information systems (GenTax, SABHRS); data collection, analysis, and reporting techniques; contract solicitation and monitoring; structures, functions, and protocols associated with formal boards and committees; compliance requirements and practices; customer service standards; business communications; records management; state and federal funding requirements; agency policies, procedures, and guidelines; supervisory principles and practices; department and state personnel policies, procedures, and precedents; and employment law.

- The minimum level of education and job-related work experience needed as a new employee **on the first day** of work is a bachelor's degree in business, public administration, or related field directly related to the work supervised and two years of job-related work experience including one year supervisory and/or management.
  - Six years of progressively responsible office management experience or equivalent will substitute for the above education and experience.
  - Experience in licensing is preferred.
  - Other combinations of education and experience will be evaluated on an individual basis.

### **Department Core Values**

- **Respect:** As a representative of the people of Montana, proceeds with the highest level of respect for the dignity of every person contacted through work. Without exception, all people are treated as equally as possible. The employee is a faithful steward of the resources provided to this agency by the citizens of Montana.
- **Integrity:** Conducts work honestly and makes decisions that establish a clear record that the department serves the public with integrity. Apologizes for mistakes and gives credit to others for their cooperation, work, and ideas in achieving positive results. Accountable for their actions and holds others accountable for theirs. Decisions and judgments achieve equity and justice for all parties involved including citizens and co-workers.
- **Productivity:** Consistently strives to minimize the waste of the department's financial, facilities and human resources. Diligently works to improve the productivity and effectiveness of the work unit. Welcomes and encourages new ideas on improving the results of the department from the public, other officials, colleagues and supervisors. Approaches work in a manner that builds goodwill, trust, and cooperation internally with other staff and externally with the public.
- **Teamwork:** Maximizes cooperation and teamwork when working with other employees, divisions and other state agencies. Willing to work with others for the opportunity to learn from their ideas, talents and knowledge. Seeks to resolve conflicts with other employees and work units in an open and respectful manner that reinforces teamwork. Celebrates the successes of others.

### **Working Conditions**

This position has considerable mental stress and pressure due to supervisory issues; workload; conflicting, multiple priorities; critical projects with hard deadlines; time constraints; significance of decisions made; the challenging nature of contacts with taxpayers, elected officials, etc.; and coordination of all functions of the office. At times, the incumbent will deal with angry, hostile, and difficult individuals to resolve concerns or to bring about compliance with regulations. This may cause stressful work conditions and a high degree of mental stress. As a Department of Revenue employee, the incumbent may come into contact with highly confidential financial and tax information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job. Work hours may exceed 40 hours per week from time to time. This position requires considerable computer and keyboard use. The incumbent may spend considerable time on the phone. Lifting is infrequent, less than 15 pounds and includes carrying light items such as papers and books. This job requires regular attendance as scheduled by the supervisor. This job cannot be performed at an alternate work site.

**Special requirements**

- Background Examination: Applicants for this position will be subject to a criminal background review before being considered for employment. Individual circumstances involving a criminal conviction will be reviewed to determine an applicant's eligibility for employment.
- Compliance with All Appropriate Montana Tax Laws: An employee's tax status must be current.

**This job profile was produced by the Office of Human Resources in conjunction with the appropriate managers.**

**Division Administrator Review:** The statements in this job profile are accurate and complete.

Signature: Shauna Helfert, Division Administrator Date: August 2010

**Human Resource Director Review:** The Office of Human Resources has reviewed this job profile.

Signature: JeanAnn Scheuer, Human Resources Director Date: August 2010

**Employee:** My signature below indicates I have read this job profile and discussed it with my supervisor.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name (print): \_\_\_\_\_